RightNow Metrics™ 4.3
New and Expanded Features

This document contains an overview of the new and expanded features in RightNow Metrics 4.3. These features apply only to the premium version of RightNow Metrics; the fixes added to version 4.3 apply to both the premium and basic versions of RightNow Metrics. (See the *RightNow Metrics 4.3 Release Notes* for a listing of the fixes.) For additional information about the basic and premium versions in RightNow Metrics, contact your RightNow sales representative.

The changes in this version will enable you to more effectively measure customer satisfaction, collect market intelligence, and identify product and service enhancements. General enhancements have been made to the following areas in RightNow Metrics:

- **Survey layout**—New options for formatting surveys allow you to fully customize the surveys you send to your customers and potential customers. Included in version 4.3 is the ability to reorder survey pages, customize the button text on each page of a survey, and insert a progress indicator on surveys. In addition, branches can be previewed and tested to ensure that all branches work as desired before launching a survey.

- **Launching surveys**—RightNow Metrics introduces error checking functionality in version 4.3 to help ensure there are no communication problems with your survey settings. Additionally, the previous limit on the number of email addresses that can be sent surveys at a given time has been increased, and you can personalize surveys by integrating customer information in outgoing Closed-Incident surveys.

- **Questions**—A new question type has been added to RightNow Metrics to insert a certain number of carriage returns (or <br> tags in HTML) between questions. This additional formatting feature makes it easy to add white space between survey questions. And new options have been added to multiple choice and range questions, providing you with additional flexibility when composing questions and providing your survey participants with additional answer options.

- **Notification Console**—RightNow Metrics 4.3 has a new Notification Console, designed specifically for creating email notifications. From this console you can create and modify the email addresses used in sending email alerts to staff members when certain situations arise.

- **Results**—RightNow Metrics 4.3 offers you more customization options by allowing you to add text, graphics, and hyperlinks to the top of the Survey Results page. In addition, CSV (comma separated value) data can now be filtered by date.

- **Addresses**—In this version, email addresses in the existing address list can be reused. When setting the schedule for an On-Demand survey, a new option allows "Previously Surveyed" email addresses to be selected. Additional options include No Selection (the default), All, Manual Selection, and Enter New.

- **Integration**—If your RightNow Metrics application is integrated with RightNow eService Center 5.5.1 or higher, you can share the eService Center staff accounts information when you upgrade to RightNow Metrics 4.3. Staff members from eService Center with proper per-

missions in their profile can now log in to RightNow Metrics using their eService Center user name and password.

- **Configuration settings**—New configuration settings in version 4.3 allow more flexibility in customizing online survey applications.

Survey Layout

We've added features to the survey layout function that will enable you to fine-tune the surveys you send to your customers. New features include the ability to reorder survey pages, customize the button text on surveys, change question numbering, and insert a progress indicator on surveys. In addition, branches can be previewed and tested to ensure that all branches work as desired. Figure 2-1 shows the Survey Layout page with some of the new options.
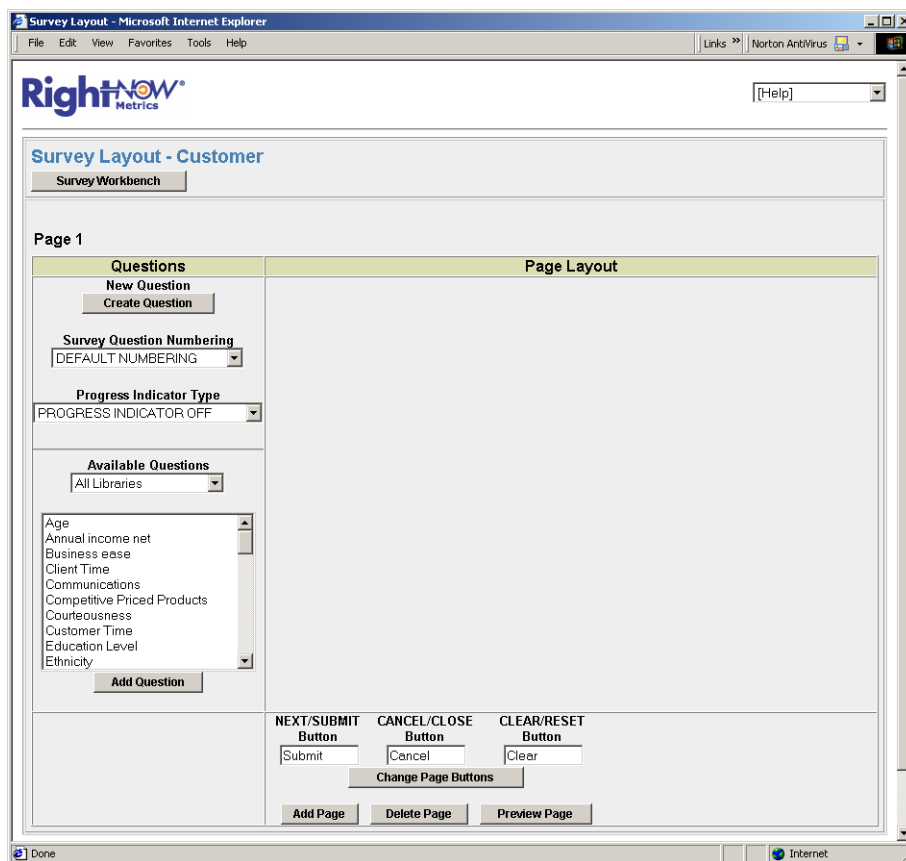
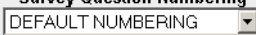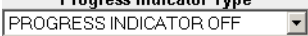*Path: Survey Workbench>Add/Remove Questions>* Go
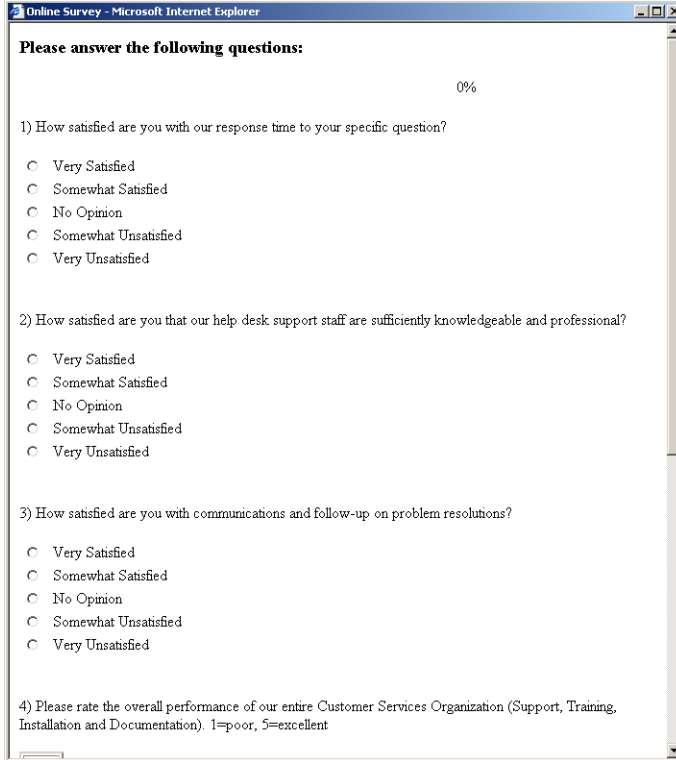

Figure 2-1: Survey Layout Page

Survey Customization Options

- **Variable question numbering**—Variable question numbering is offered in RightNow Metrics 4.3. Just click **Survey Question Numbering** `DEFAULT NUMBERING ▾` to change the numbering of your questions. Options include default numbering, continuous numbering, or no numbering.

- **Ability to customize button text on surveys**—You can now customize the text on buttons that appear on surveys, and you can change the text on a page-by-page basis. Simply highlight the appropriate text, make your change, and click **Change Page Buttons** .

- **New progress indicator on surveys**—A progress indicator can now be enabled on surveys so that survey participants can track their progress in completing the survey. Options include a progress bar indicator or progress number indicator. Click **Progress Indicator Type** `PROGRESS INDICATOR OFF ▾` to enable this feature. Figure 2-2 shows a survey with the progress number indicator enabled (shown as a percentage).

Figure 2-2: Survey with Progress Number Indicator Enabled

As survey participants complete questions, the percentage changes to reflect how much of the survey has been completed.

Note: The color and background colors for the progress bar indicator are white and black.

Reordering Pages and Branching Options

Pages in a survey can now be reordered in the same easy manner that questions can be reordered. In addition, you can test and preview your branches before launching surveys.

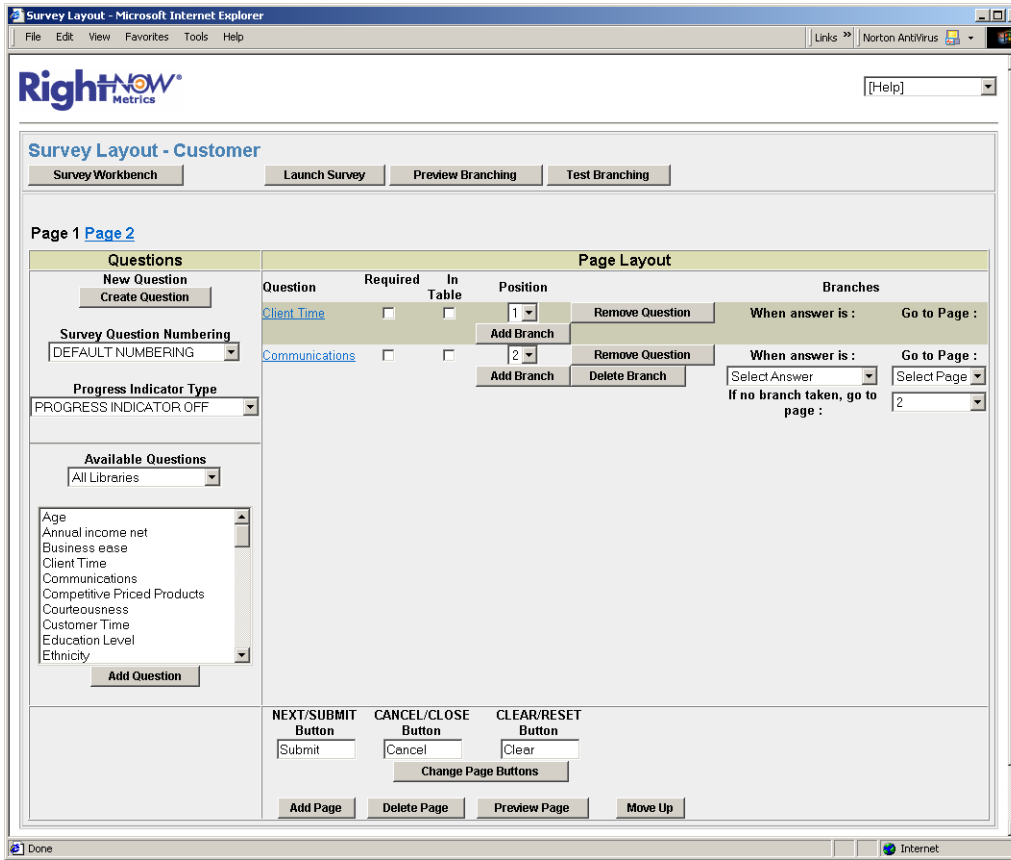*Path: Survey Workbench>Add/Remove Questions>* `Add Page`

Figure 2-3: Reordering Pages, and Testing and Previewing Branches

You'll use the `Move Up` and `Move Down` buttons to change the order of the pages in surveys.

For example, if you are on page 1 of a survey and click `Move Up`, the questions on page 1 move to page 2. Any questions on page 2 will move to page 1.

Preview branching

You can also preview and test any branches you've created. Click [Preview Branching] to view the branch sequence for a survey. Figure 2-4 shows the new Branch Preview page.
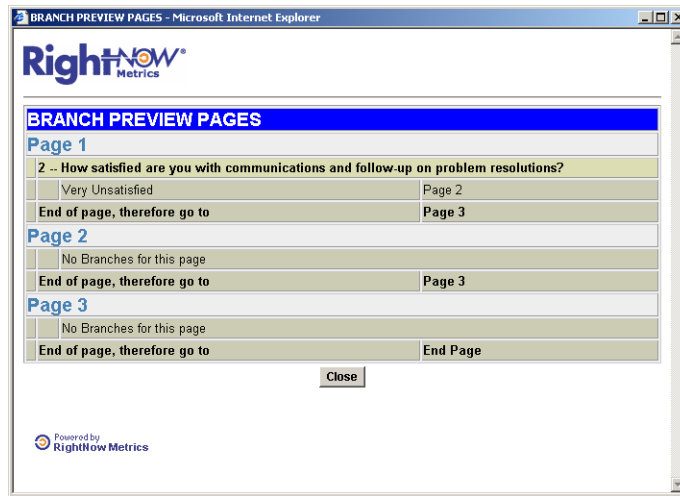
Path: Survey Workbench> [Preview Branching]

Figure 2-4: Branch Preview

Test branching

To test a branch, click [Test Branching]. The survey will open in a new Web browser. You can then test the branches by completing the survey and choosing the option in the question(s) that triggers the branch(es).

Launching Surveys

In this version of RightNow Metrics, email notifications can be created to notify staff when there is a problem in any network, server, mailbox, or password settings when launching surveys. In addition, more surveys can be sent at once, and customer information can be integrated in out-going Closed-Incident surveys.

Error checking functionality

Staff members can now create an email notification so they are notified when there is a problem with any network, server, mailbox, or password settings they have defined when launching surveys. Figure 2-5 shows the Select Survey Settings page with the new Notification Rule drop-down menu.

Path: Survey Workbench>Launch Survey

Figure 2-5: New Notification Rule Drop-Down Menu

Additional Options

- **Increased number of survey participants** — In this version of RightNow Metrics, the limit on the number of email addresses to be sent surveys at a given time (500) has been significantly increased. Refer to the *RightNow Metrics 4.3 Release Notes* for a further explanation of this fix.

- **Personalized surveys** — Customer information can now be integrated in outgoing Closed-Incident surveys, offering a more personalized survey to an organization's customers.

- **Change in survey settings Password field** — It is no longer necessary to re-enter the password when making changes to a setting on the Survey Settings page. Asterisks now appear in the Password field and must remain to update survey settings.

Questions

A new question type has been added in version 4.3 and additional options to question parameters provide more control over answer options and greater flexibility in composing questions and answer options.

New Question Type

A new question type has been added to RightNow Metrics called "spaces." Spaces can be used to insert a certain number of carriage returns (or <br> tags in HTML) between questions. This formatting feature can be used to create a break in a survey or to provide more white space between questions. Figure 2-6 shows the Creating Question wizard for creating a Spaces question type.

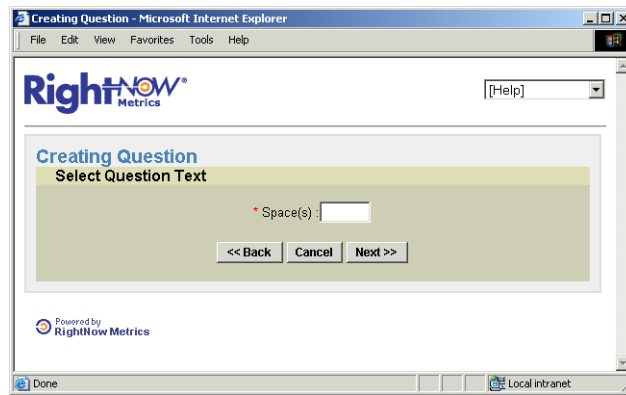*Path: Creating Question Wizard>Spaces*

Figure 2-6: Spaces Question Type Setting

Ability to size answer field in short answer questions

The size of the answer field in short answer questions is now configurable. By default, this field is 3 lines high by 40 characters wide. And the maximum number of characters allowed for the answer text has been increased to approximately 4000 characters. Figure 2-7 shows the Creating Question wizard screen for setting the size of the short answer question field.
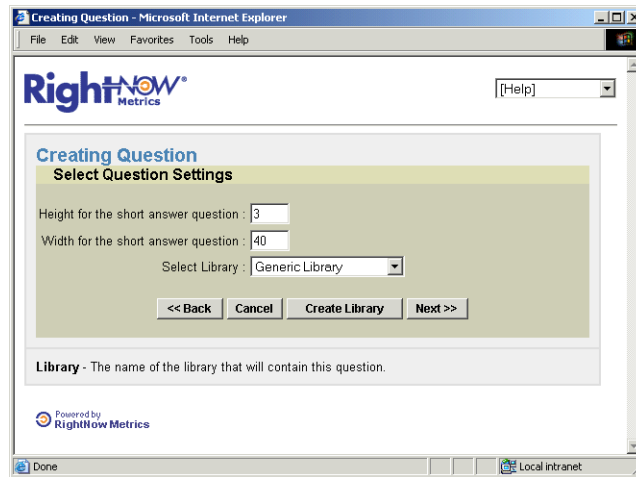
Path: Questions> [Create Question]

Figure 2-7: Setting Size of Short Answer Field

Additional Changes to Question Options

- **New format for multiple choice and range questions**—Multiple choice and range questions now have an additional answer layout, Pull Down Menu List. This option will create a question with its available answers displayed in a drop-down menu. Previously, range questions needed to be formatted with horizontal or vertical radio buttons, and multiple choice questions could be formatted with horizontal, vertical, two columns, or three columns of radio buttons.

- **Additional options for multiple choice and check all questions**—Multiple choice and check all questions now allow "Other" and "Comment" field types. The Other field displays a text box where survey participants can type a choice that is not listed and select it as their answer. The Comment text box allows survey participants to write additional comments.

- **Increased limit for multiple choice and check all answers**—The maximum number of characters allowed for a multiple choice answer and check all answer has been increased to 255 characters.

Notification Console

The email notifications function of RightNow Metrics has been moved to its own console. The new Notification Console can be accessed through the tab bar and provides a convenient location for organizing and maintaining email notifications. (Previously, email notifications were only accessible through the scoring and notification rules functions.)

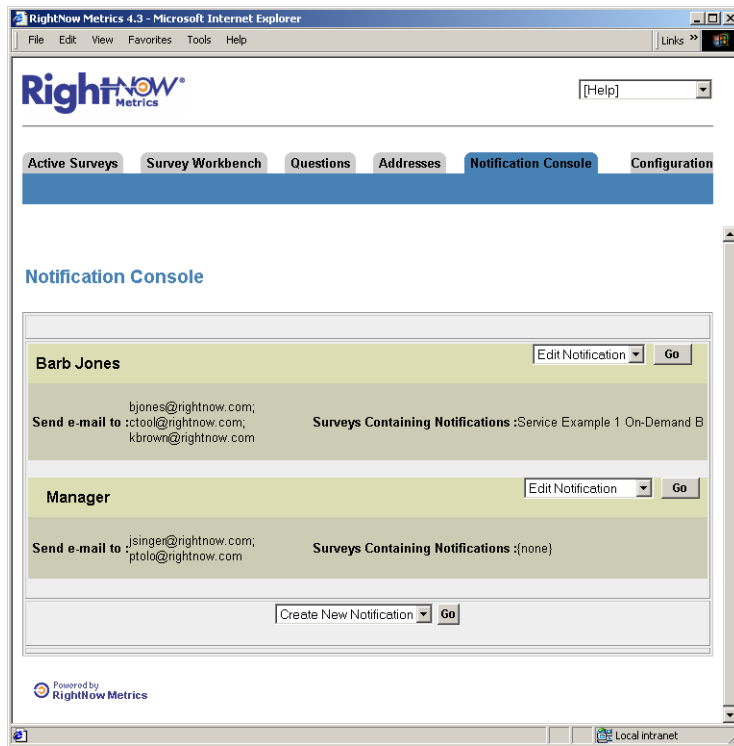Figure 2-8 shows the new Notification Console in RightNow Metrics 4.3.

Figure 2-8: Notification Console

Results

In version 4.3, options for viewing and exporting survey results have been expanded.

- **Customize graphical results**—The top of the graphical results pages can now be customized to include text, graphics, and hyperlinks. Figure 2-9 shows the area on the Survey Results page for customization.

Path: Active Surveys> `Results` *>Graphical*

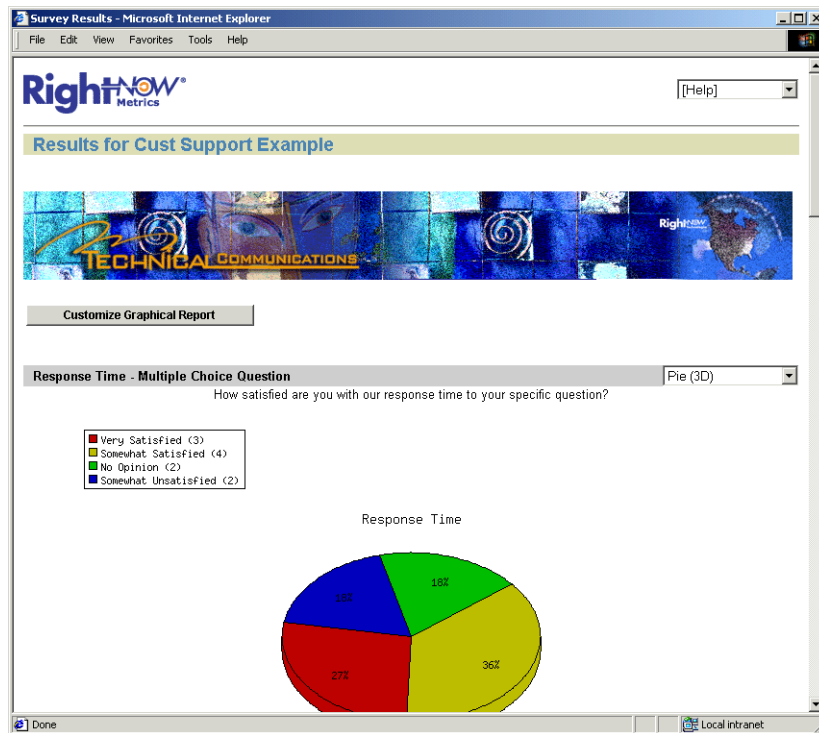*Results>* `Go` `>` `Customize Graphical Report` `>` `Graph All Questions`

Figure 2-9: Customized Graphical Display of Survey Results

Valid HTML can be inserted in the HTML Top Customization Results Area to add text, graphics, and hyperlinks to the top of the Survey Results page. These elements will be added immediately after the body tag. Up to 25,000 characters can be added to this customization area.

• **Filter CSV data by date**—CSV (comma separated value) data can now be filtered by date.

Addresses

Email addresses in the existing address list can now be reused. When setting the schedule for an On-Demand survey, a new option allows "Previously Surveyed" email addresses to be selected. Figure 2-10 shows the Select Email Addresses drop-down menu for selecting previously surveyed email addresses.
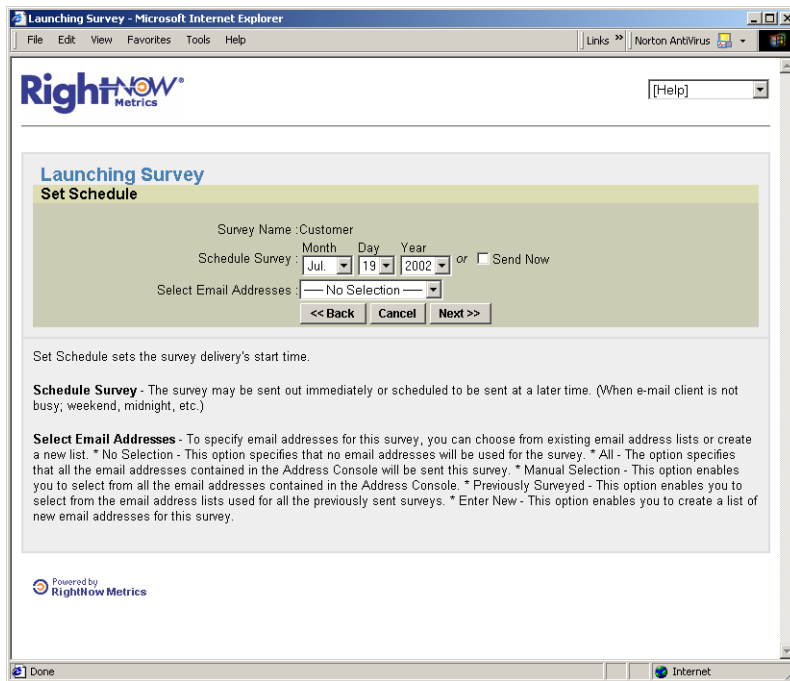
Path: Survey Workbench>Launch Survey

Figure 2-10: Option for Selecting Previously Surveyed Email Addresses

Integration

For organizations who are upgrading to this version of RightNow Metrics and have upgraded to eService Center 5.5.1., the eService Center staff accounts information can be shared. Staff members from eService Center with proper permissions in their profile can now log in to RightNow Metrics using their eService Center user name and password.

Utilities

Options in the *pollster* utility now provide more control over how *pollster* executes its actions. Previously, *pollster* processed survey responses and sent out surveys in one action; in RightNow Metrics 4.3, flags can be set to just process survey responses from the mailbox or to just send out surveys.

New and Changed Configuration Settings

New configuration settings provide more options for configuring specific areas in RightNow Metrics.

- **New configuration settings:**
  - ▷ RightNow Metrics>General>RightNow Web>RNW_INTEGRATION—Enables the use of RightNow eService Center user names, passwords, and profiles to log in to RightNow Metrics. This feature is only compatible with RightNow eService Center 5.5.1 and higher. Default is disabled (No).
  - ▷ Common>General>Directories>DIR_TEMP—Specifies the directory where temporary files will be created. When an eService Center application needs to create certain temporary files, they will be put in this directory. If this setting is left blank, the system's temporary environment variable will be used (TMPDIR on *NIX systems, and TMP on Windows systems). Default is blank.

  Note: Certain types of temporary files (such as file attachments) will not be created in this directory due to other restrictions.

  - ▷ Common>Database>Oracle>ORACLE_INSTALL_SIZE—Sets the initial size (SMALL, MEDIUM, LARGE) of database objects. This value has its main impact when the database is initially set up, but will also affect objects created during upgrades and temporary objects. Choosing a value that is too large for the database will waste space; choosing a value that is too small will result in storage fragmentation and performance degradation. Default is medium.

▷ RightNow Metrics>General>Survey Settings>SURV_GRAPH_NUM_ITEMS—On the graphical results page, the responses to short answer questions are listed in a table. The number of responses listed is specified by this verb. Default is 10.